HOW TO AUTOMATE WELCOME EMAILS

Creating a Mail Merge Flow in Power Automate

What is this?

This document walks you through using Microsoft's Power Automate app to send form emails to multiple recipients at once.

If you have more than a few people to email, sending personalized messages takes forever. The mail merge feature in Word allows you to draft personalized email content, but it does not support attachments (like flyers or forms) or CC-ing other recipients (like supervisors). Power Automate uses simple programs called "flows" to do all of that at the click of a button.

This document walks you through creating a new flow to send personalized emails with attachments to as many people as you want in minutes.

Helpful Tips

- Open the Navigation pane in Word or the Bookmark pane in Acrobat to see all of the steps at once and skip around in this document.
- Use this document in conjunction with this YouTube video
    - The narrator added timestamps in the description, so you can skip around to the steps you want to see.

Table of Contents

How to Create a Mail Merge Flow

Step 1 – Recipient Data

Create a spreadsheet in Excel with all of your recipient data, then save it to OneDrive or SharePoint.

The mail merge will use merge tags to personalize each email message. That means any personalized information you want in your email (such as recipients' first names) must be included as column headers in your spreadsheet.

> *For example, if you want each email addressed to the recipient by their first name, your spreadsheet must have a column dedicated to each recipient's first name, with an identifiable header.*

Include other columns for information about email logistics, such as email addresses for each recipient and anyone who will be CC'd or BCC'd.

Examples of common headers:

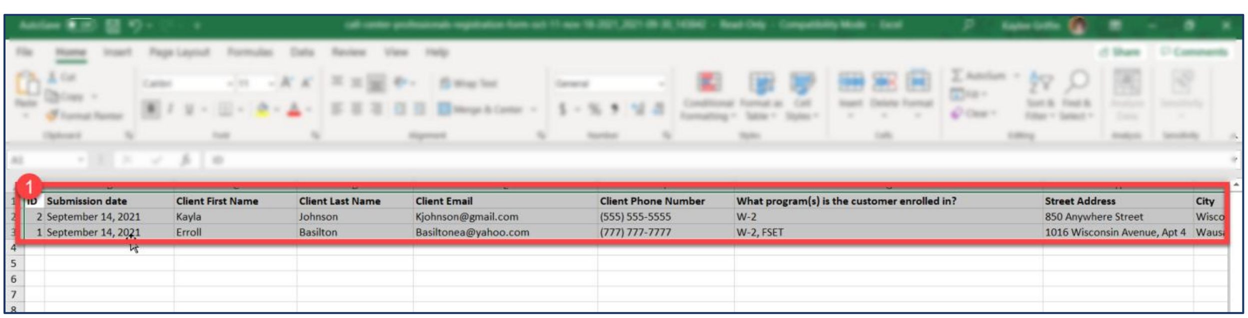
- "FirstName"
- "LastName"
- "RecipientEmail"
- "MailingAddress"
- "Username"
- "InterviewDate"
- "ModelNumber"

Step 2 – Format Recipient Data in a Table

Insert your recipient data into a table in the spreadsheet.

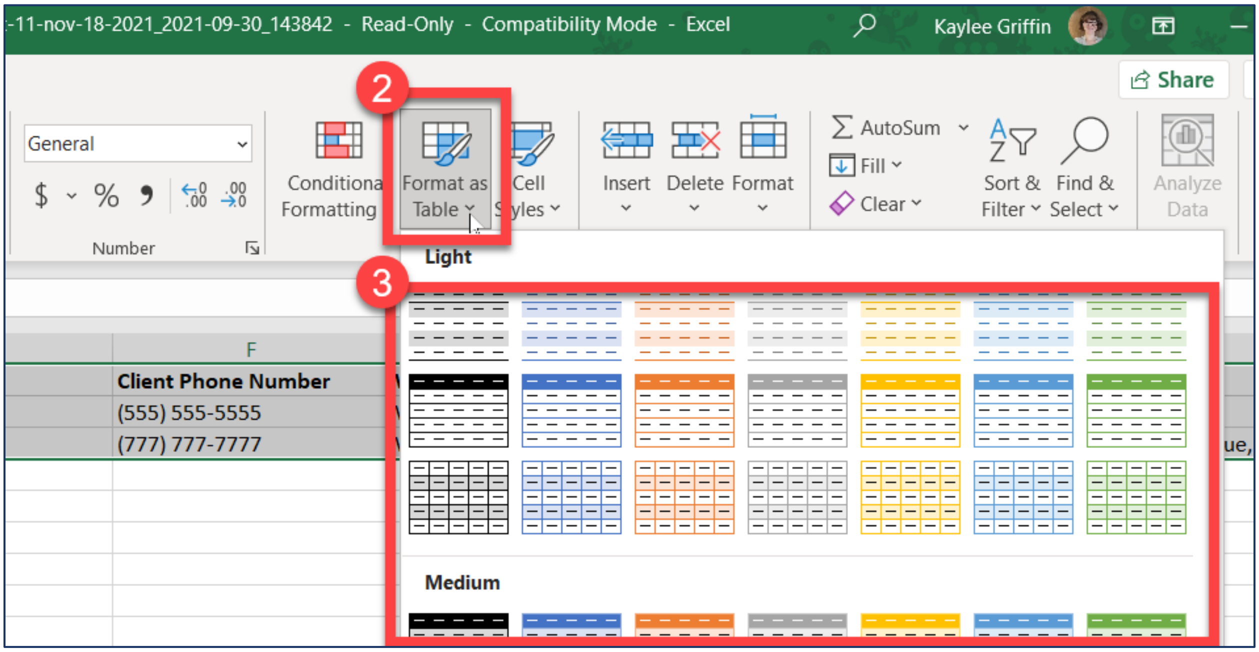
If the recipient data in your spreadsheet is not already formatted in a table, you must insert it into a table.

1. Select all of the data in your spreadsheet, including the column headers.

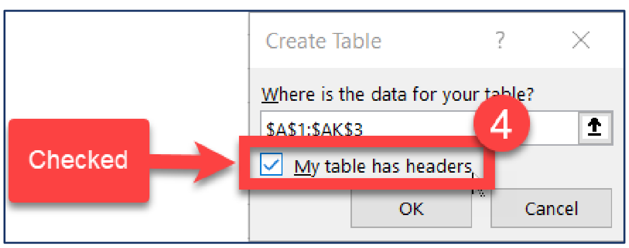


CONTINUED…

2. With the data selected, click “Format as Table” in the Home tab of the Ribbon.
3. Select a style (it does not affect the flow).



4. In the dialogue box that appears, ensure the box next to, “My table has headers” is checked. If it is not checked, click it to check it.

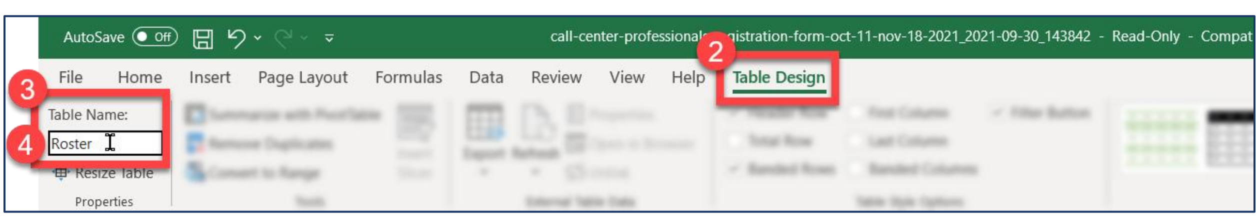


5. Click “Ok”. Your recipient data is now in a table.

Step 3 – Name the Table

Name the table containing your recipient data, so you can find it later.

1. Click a cell anywhere in your table.
2. Open the “Table Design” tab in the Ribbon.
3. Farthest to the left in the Ribbon, you will see a field called, “Table Name:”.
4. Click in that field; enter a name for the table. Below, the table is named, “Roster”.



Step 4 – Save Spreadsheet to OneDrive or SharePoint

Save your roster to a cloud location you will remember.

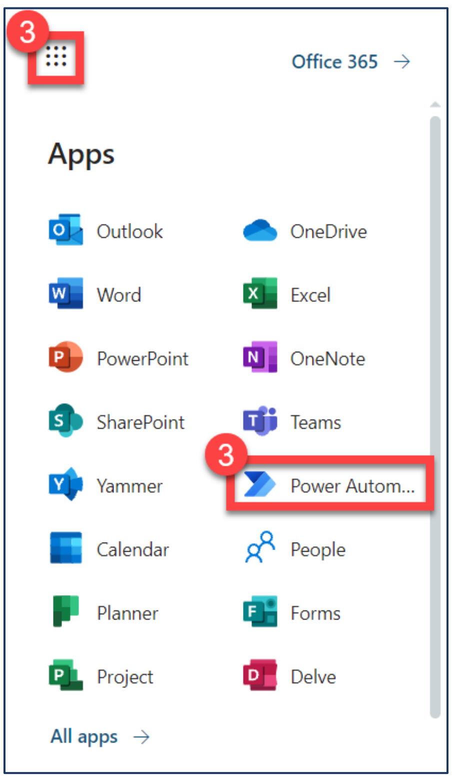
Any location will do as long as you can find the spreadsheet in either a OneDrive or SharePoint location.

NOTE: Power Automate can link with other cloud storage apps. That is not covered here.

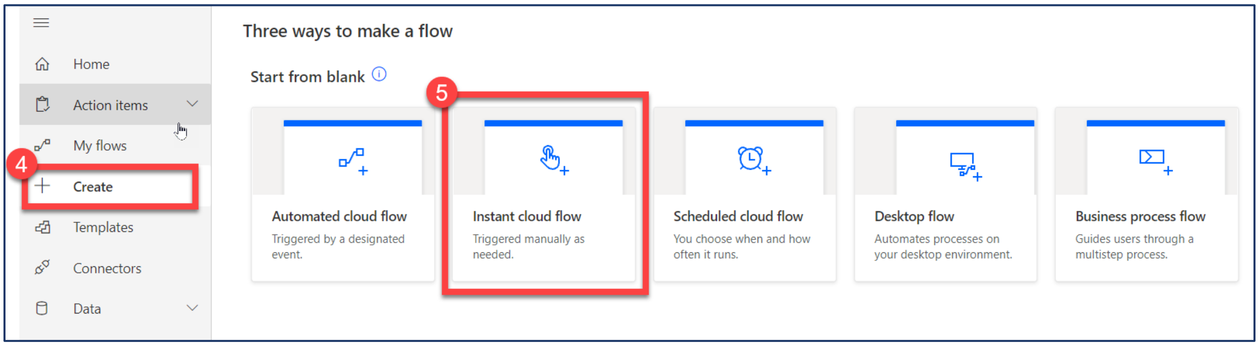
Step 5 – Open Power Automate App

Open the Power Automate app in Office 365 and start a new flow.

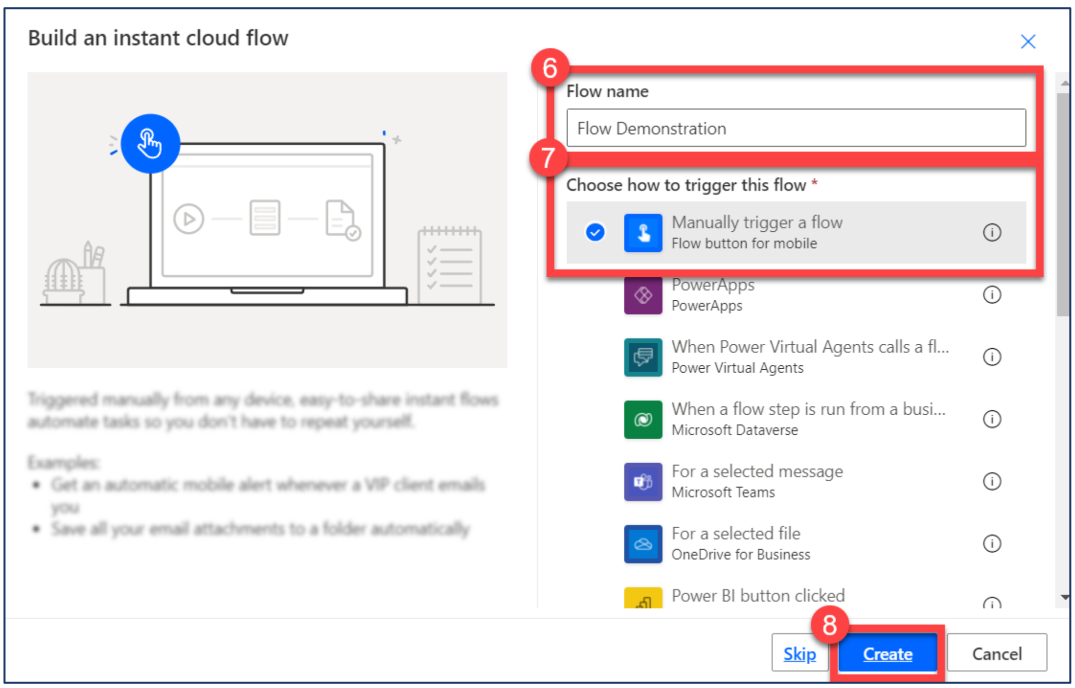
1. Open Office 365 in your browser
2. Log in if you need to
3. Open the Power Automate app (Click "All apps →" if you don't see it listed)



4. Click “Create” in the navigation panel to the left.
5. Select “Instant cloud flow” from the options near the top of the screen.



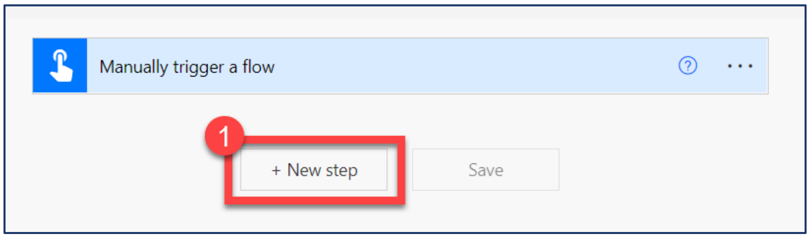
6. Name your flow in the box near the top right of the window that appears.
7. Select “Manually trigger a flow” for how to trigger the flow.
8. Click the “Create” button near the bottom right of the window. You now have a new flow to which you can add steps.



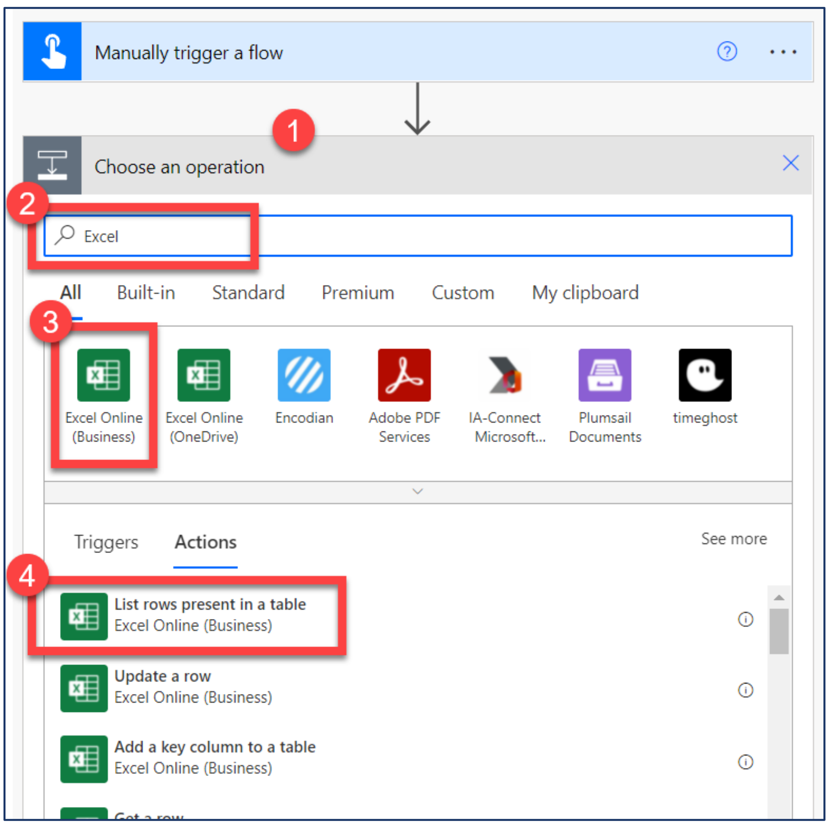
Step 6 – Link your Spreadsheet to the Flow

Program the flow to pull data from your spreadsheet with recipient data.

1. Click the "+ New step" button

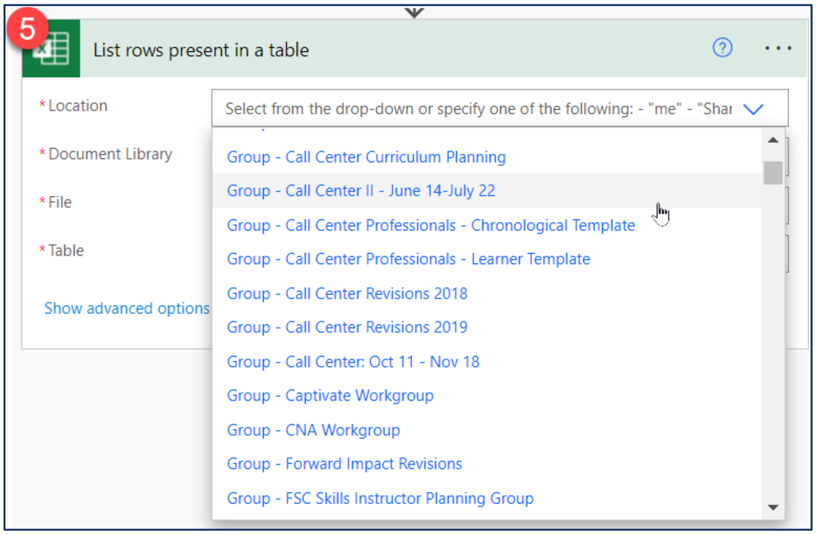


2. Type "Excel" into the search bar that appears in the new box
3. Click Excel Online (Business) – NOT the OneDrive option, if you are using a business account
4. From the options that appear below, click "List rows present in a table"

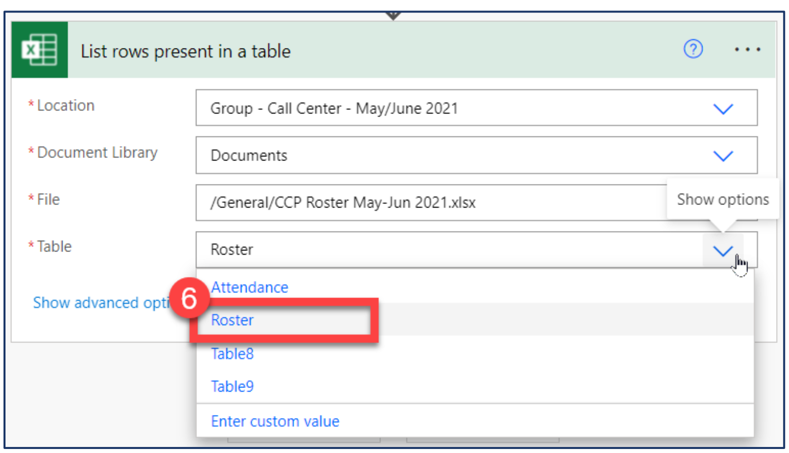


CONTINUED…

5. Locate your spreadsheet using the dropdown menu in each of the fields in the form… the form that appears works like a file explorer.
    a. "Location" refers to your personal OneDrive, a OneDrive group, or a SharePoint site.



6. In the last field – "Table" – you will see the name of your table as an option; select it. Below, you will see the example table, "Roster". The flow will now pull from your table of recipient data.



Step 7 – Link Attachments to Flow (Optional)

Add flow steps to locate any attachments you want included in your emails.

If you do not have any attachments, jump to [Step 8](#).

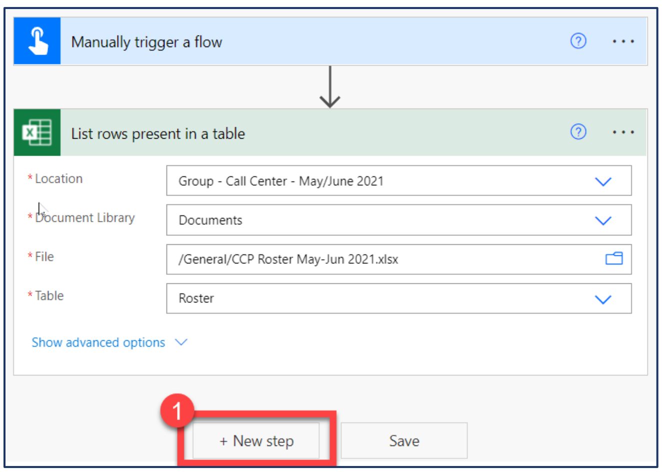
NOTE: Attachments must be saved in a OneDrive or SharePoint location. This step will show you how to attach a file saved on SharePoint. The process is similar for files saved in OneDrive.

This step has two parts.

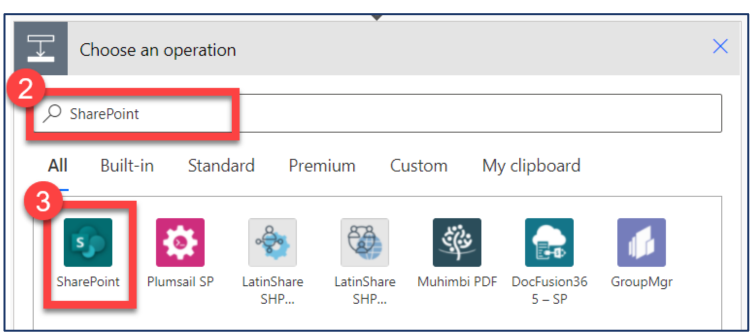
Part A – Fetch Attachment Metadata

The first part programs the flow to tell recipients' email provider what type of file is attached, what program to open the attachment with, and the title of the file…

1. Click the "+New Step" button.

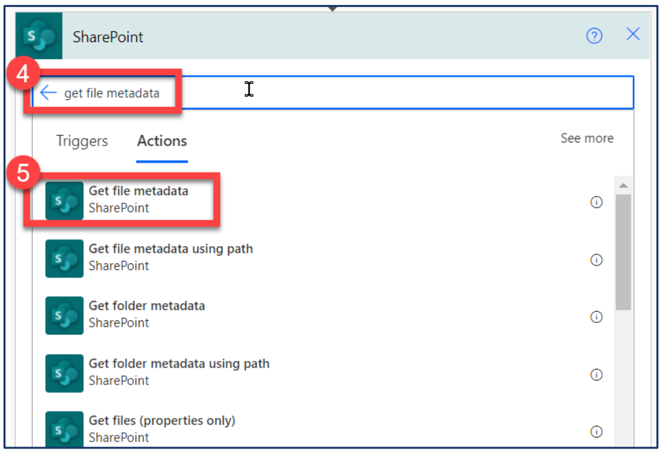


2. Type "SharePoint" into the search bar that appears in the new box.
3. Select "SharePoint" from the list of apps that appears below the search bar.
   a. If your file is saved in OneDrive, search for OneDrive here instead.

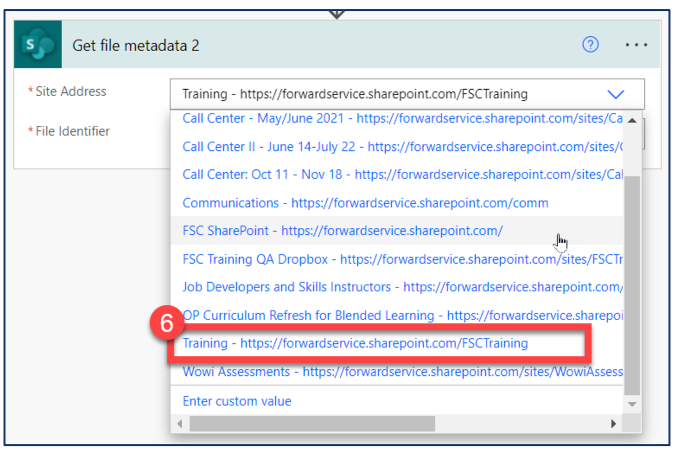


CONTINUED…

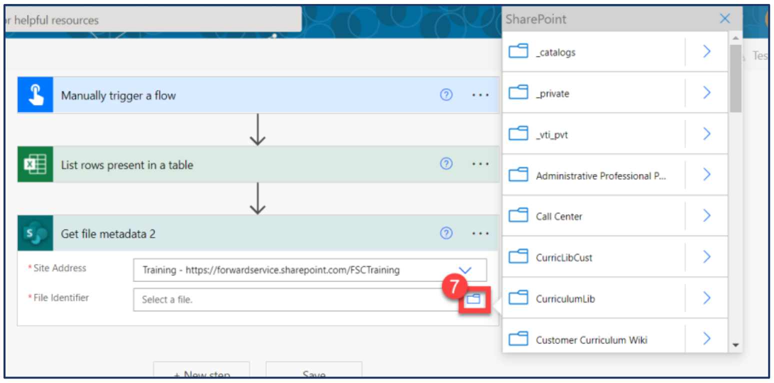
4. Type “get file metadata” in the new search bar that appears.
5. Select “Get file metadata” from the options that appear below the search bar. Another file explorer form will appear.



6. In the “Site Address” field, find the attachment file’s location by scrolling.
    a. TIP: Locations are listed alphabetically.



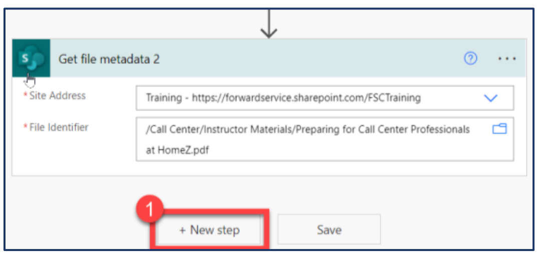
7. Click on the blue folder icon in the “File Identifier” field to locate the file you want to attach. This works like a file explorer.



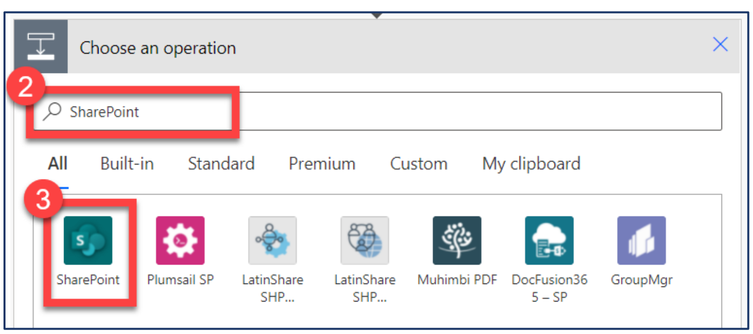
Part B – Allow Recipients to View Attachment Content

The second part of this step makes sure recipients can view the content of your attachment.

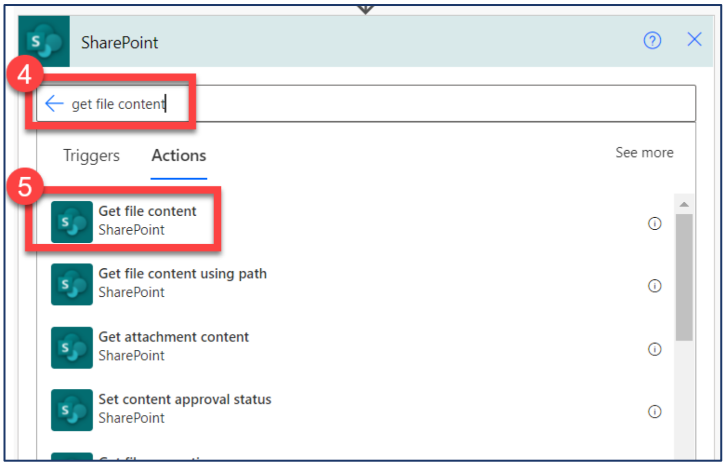
1. Click the “+New Step” button.



2. Type “SharePoint” into the search bar that appears in the new box.
3. Select “SharePoint” from the list of apps that appears below the search bar. If your attachment is saved in OneDrive, search for and select that instead.

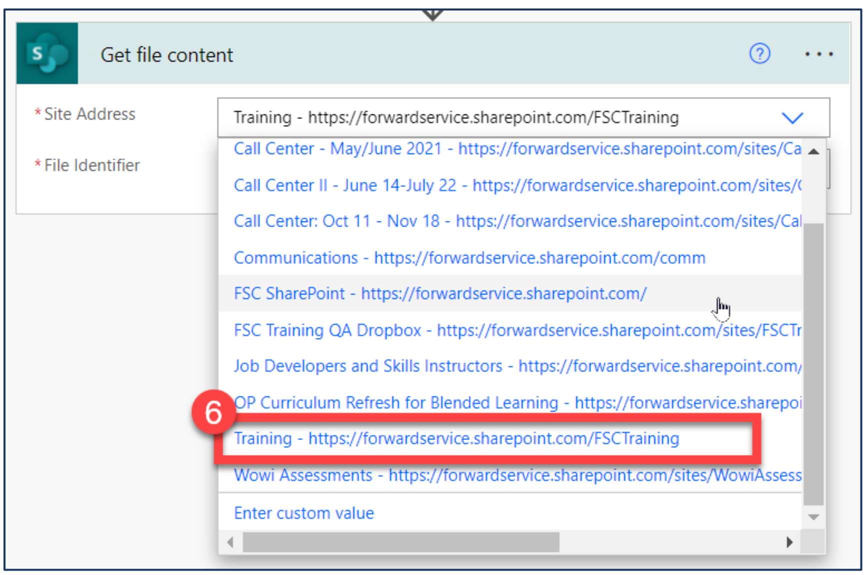


4. Type “get file content” into the new search bar that appears.
5. Select “Get file content” from the options that appear below the search bar. Another file explorer form will appear.

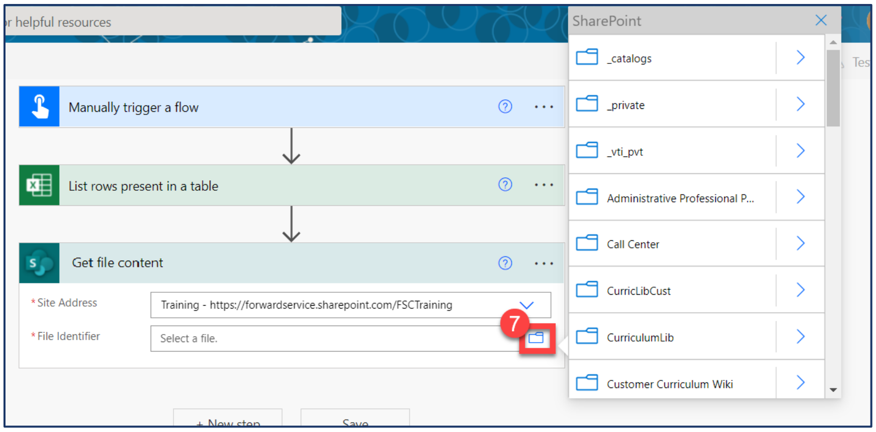


CONTINUED…

6. In the “Site Address” field, find the attachment file’s location.
    a. TIP: Locations are listed alphabetically.



7. Click on the blue folder icon in the “File Identifier” field to locate the file you want to attach. This works like a file explorer.

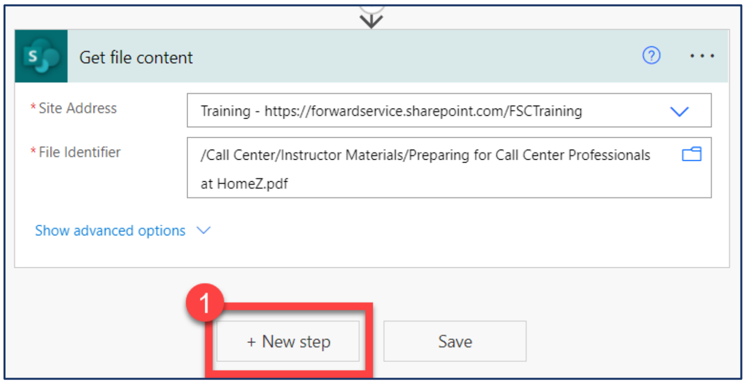


Save your flow.

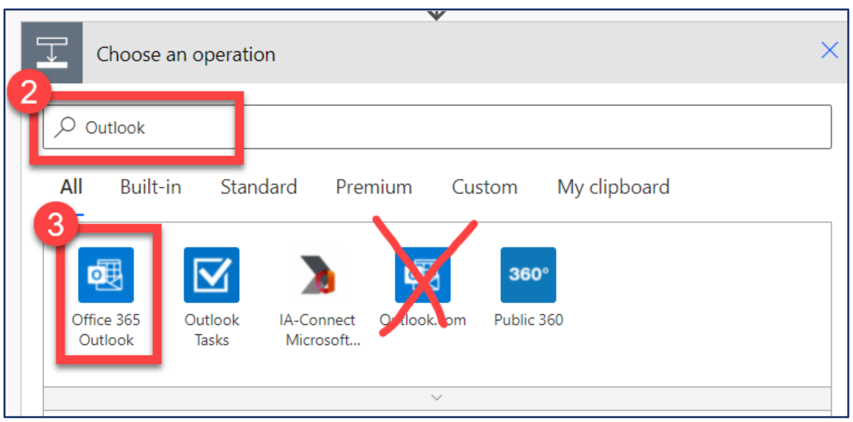
Step 8 – Set up Emails

Add a step to send the emails.

1. Click the “+ New Step” button.

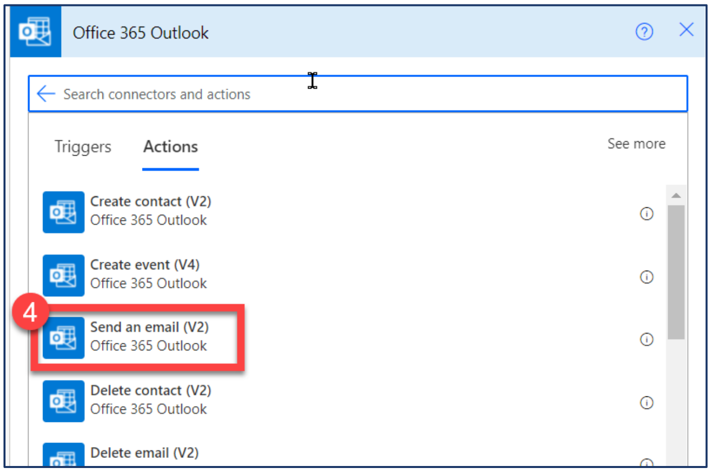


2. Type “Outlook” into the search bar.
3. Select “Office 365 Outlook” from the apps below the search bar.
   a. Do NOT select Outlook.com – this is for personal accounts.

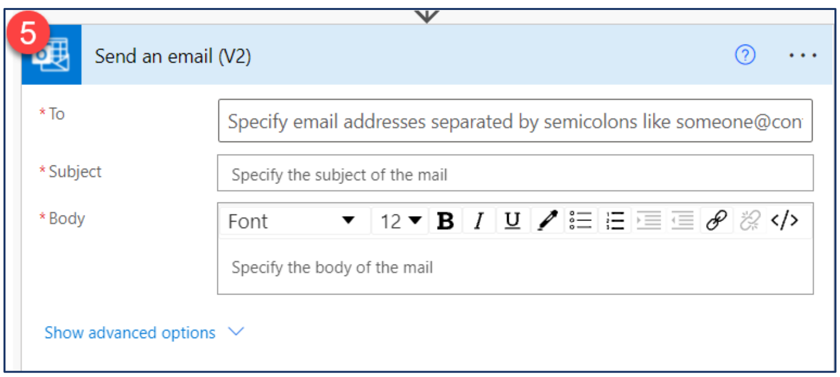


CONTINUED…

4. Select “Send an email (V2)” from the options that appear. Search for it if it is not visible.



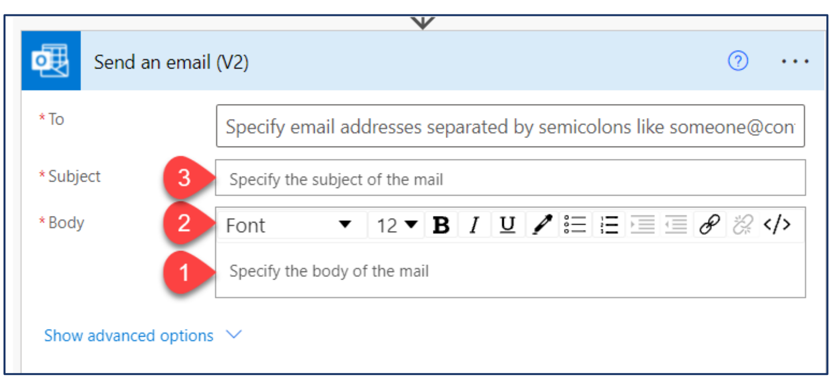
5. You can now set up your email message.



Step 9 – Add Email Content

Add the content of your email.

1. Type or paste your email message into the field labeled, “Body”.
2. Format it using the tools at the top of that field.
3. Add your subject line to the “Subject” field.

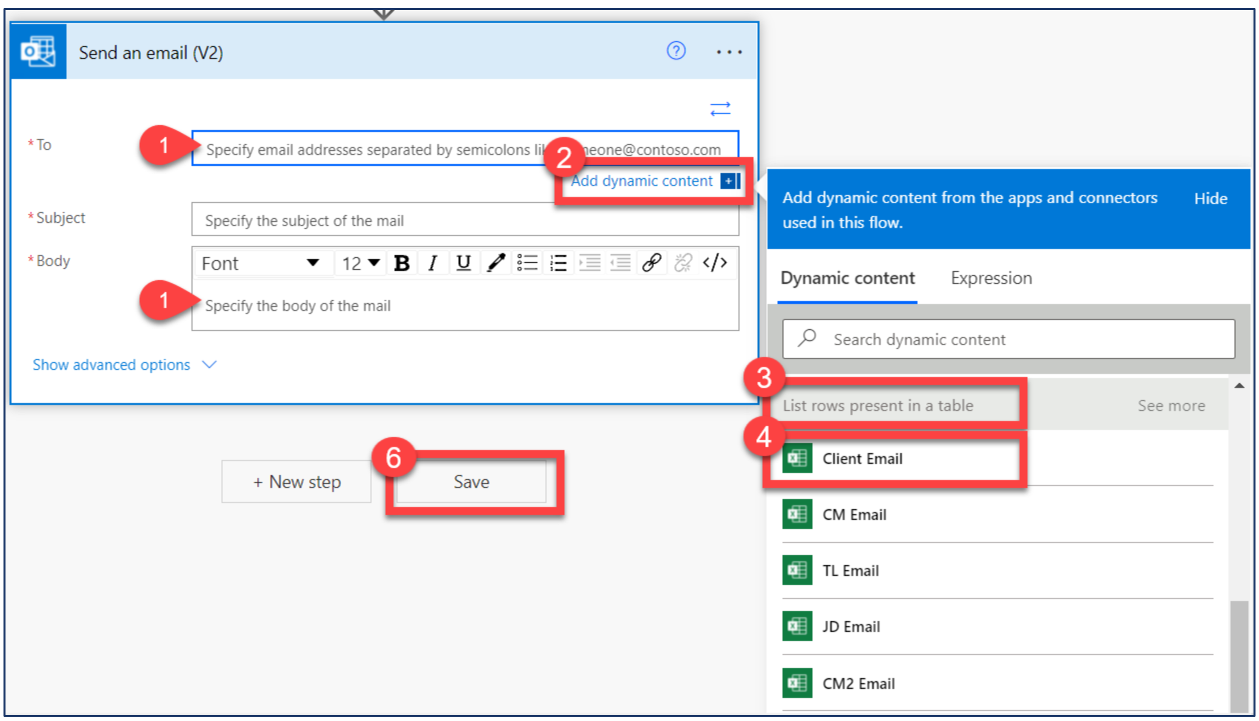


Step 10 – Personalize Emails

Use merge tags (“dynamic content”) to personalize your email messages.

Anywhere you want recipient-specific data, insert a merge tag. This is similar to the mail merge function in Word.

1. Click inside the field (e.g. “To” or “Subject”) or the place in the body of the email where you want recipient data.
2. Click “Add dynamic content”, which should have appeared below the bottom right corner of the field in which you clicked. A menu will appear to the right.
3. Scroll down in the menu until you get to the section labeled, “List rows present in a table.”
4. Find the merge tag that matches the column header in your spreadsheet from which you want to pull the recipient data (e.g. “FirstName” or “ModelNumber”).
5. Repeat 1-4 in this step for all of the recipient data you want in the email.
6. **Save your flow.**



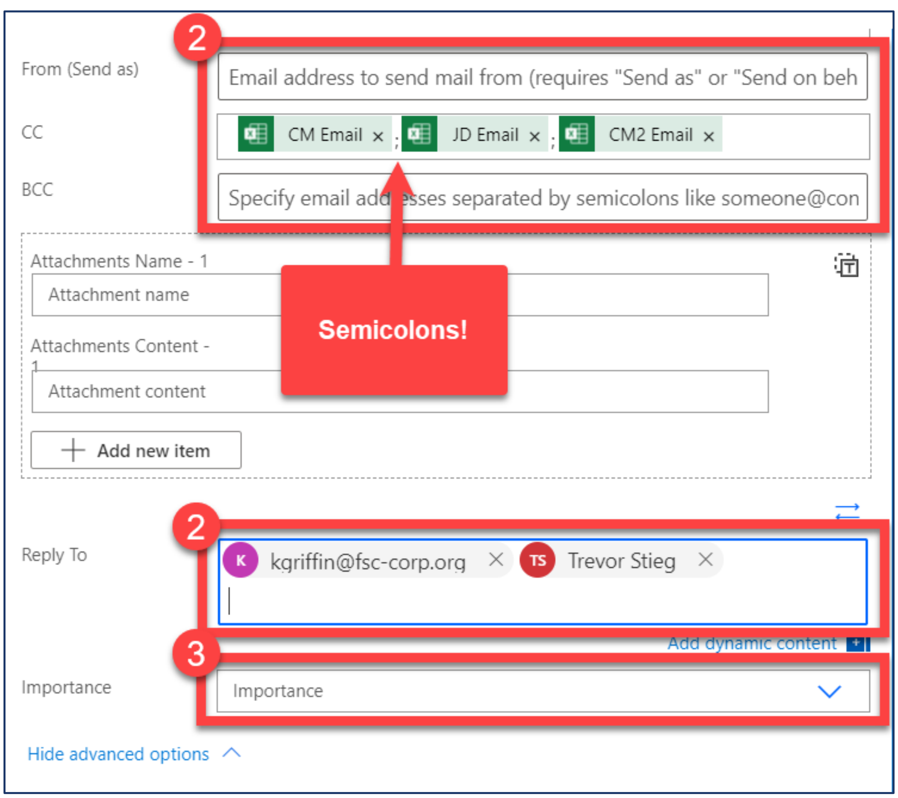
Step 11 – Add Additional Recipients

Edit the appropriate email options, like CC, BCC, replies, etc. in the Advanced Options.

This ensures your email comes from the right person, goes to all of the right people, and sends replies to the right people.

1. Click “Show advanced options” at the bottom of the email.

2. Edit the “From”, “CC”, “BCC”, and “Reply To” fields as needed by entering email addresses and/or merge tags. You can use the “Add dynamic content” option for merge tags.
    a. **IMPORTANT: Add a semicolon (;) between each recipient and/or sender, INCLUDING between each merge tag. The flow will not send if you fail to do this. Do not include spaces between email addresses or merge tags.**
3. (Optional) Set the importance level for your email.

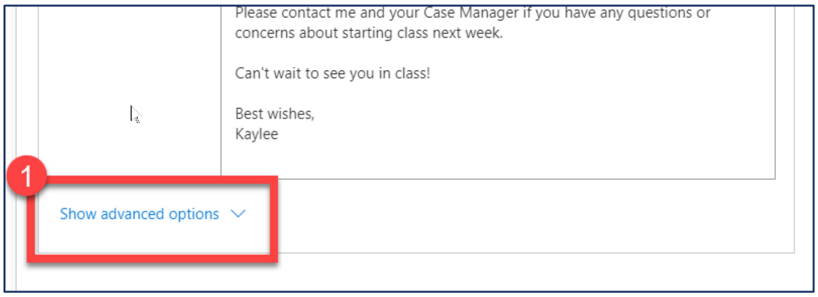


Step 12 – Add Attachments (Optional)

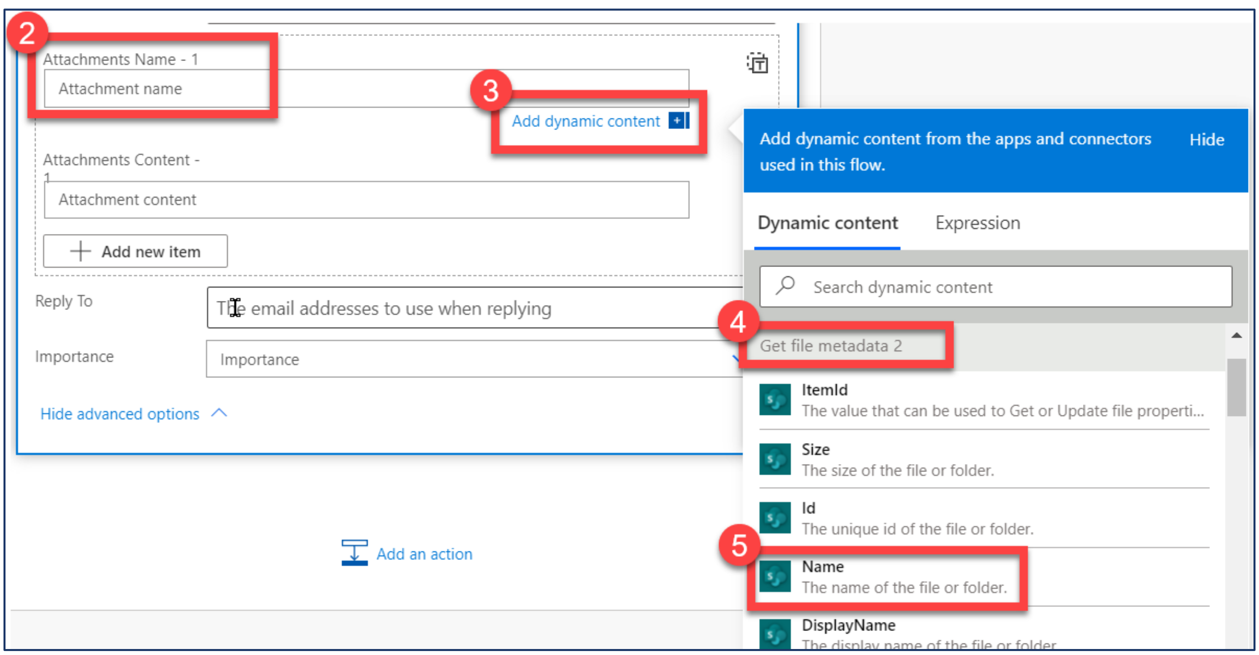
Attach any files you want attached to your emails.

If you do not have any attachments, jump to [Step 13].

1. Click "Show advanced options" near the bottom left corner of the email body.

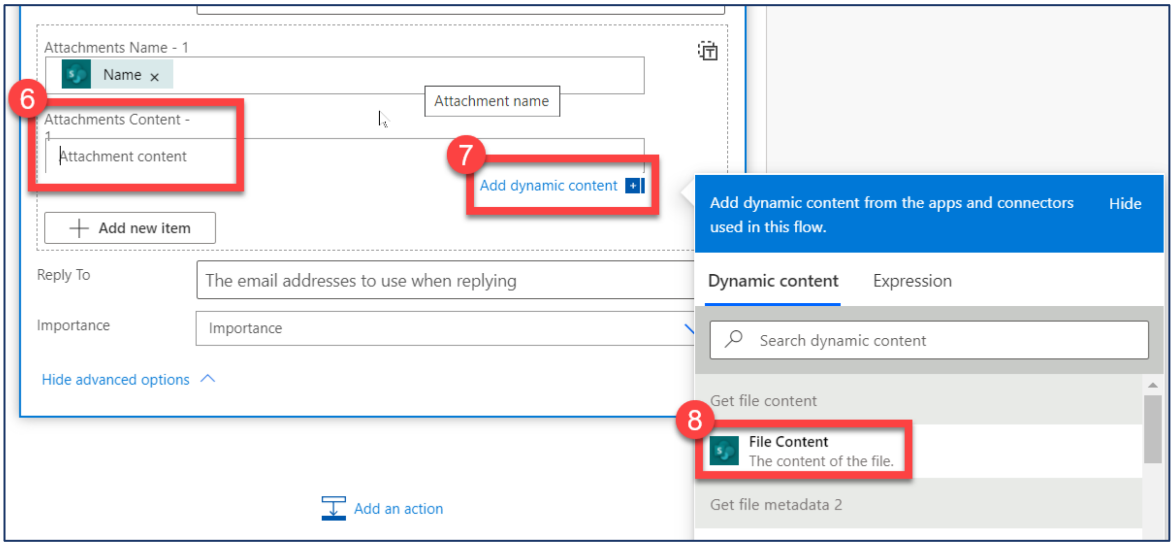


2. Click in the field labeled, "Attachment name".
3. Click "Add dynamic content". A menu will appear to the right.
4. Scroll down in the menu to the section called, "Get file metadata".
5. Select "Name".



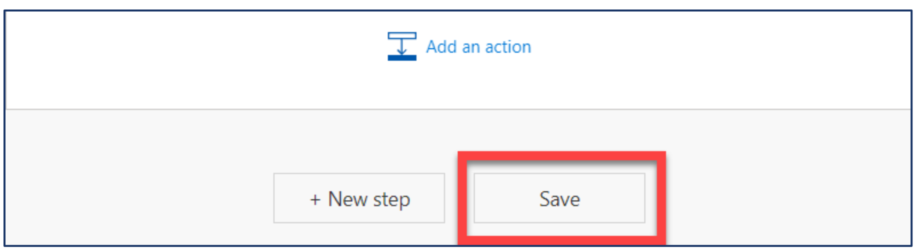
CONTINUED…

6. Click in the field labeled, “Attachment content”.
7. Click “Add dynamic content”. A menu will appear to the right.
8. Select “File content” from the section called, “Get file content”.



Step 13 – Save Your Flow

Save the flow.



Step 14 – Test Your Flow

Power Automate requires you to test your flow before it can be run.

IMPORTANT: Unless you replace your spreadsheet file with something else, it WILL send emails to all of your recipients.

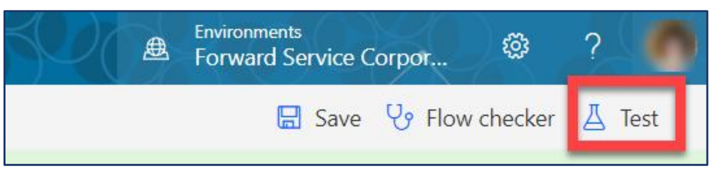
To avoid this, you can temporarily replace your spreadsheet with a fake, or "dummy," list that is populated with test information, such as internal email addresses.

Create a test spreadsheet…

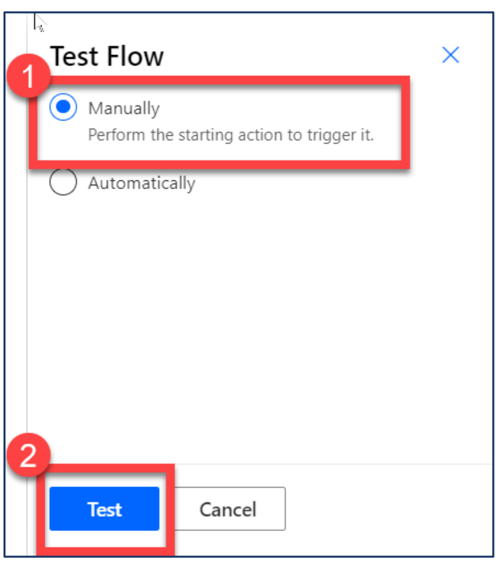
1. Save a **copy** of your spreadsheet to the same cloud location as the other – name it something easy to differentiate from the real one.
2. Delete all of the recipient data and replace it with your test data – Do not delete any column headers.
    a. TIP: You only need to populate the merge tag data your flow uses
3. Save the changes to your test spreadsheet.
4. Repeat **Step 6**, but this time, select your test spreadsheet.
5. **Save the flow.**

Run the test

Click "Test" in the upper right corner of the screen.

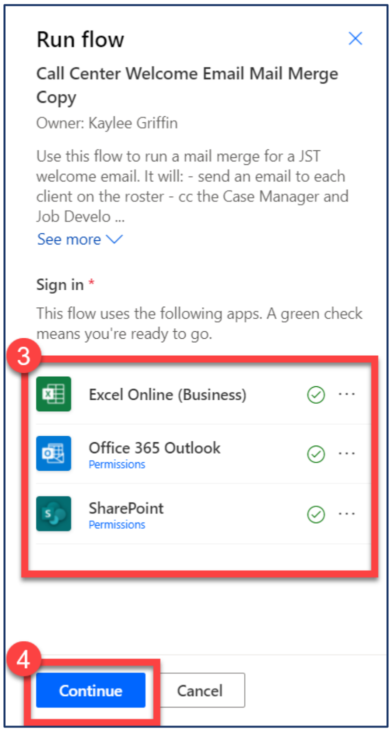


1. Click the radio button next to "Manually".
2. Click the "Test" button at the bottom of the panel.

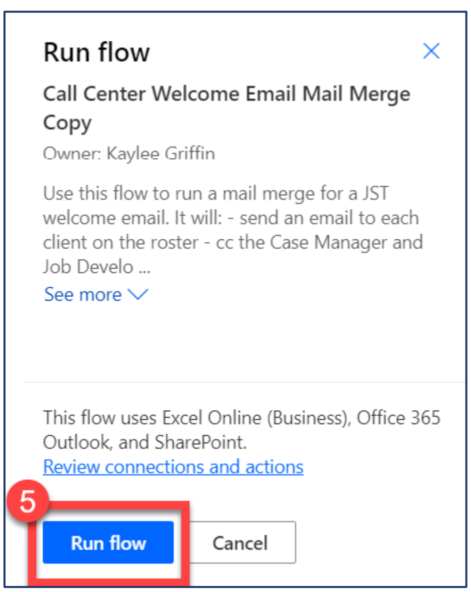


CONTINUED…

3. Power Automate will check that you are signed into all required Office 365 applications. If you are not signed in, you will be prompted to do so.
4. Once you have green checkmarks for all needed apps, click the “Continue” button at the bottom of the panel.

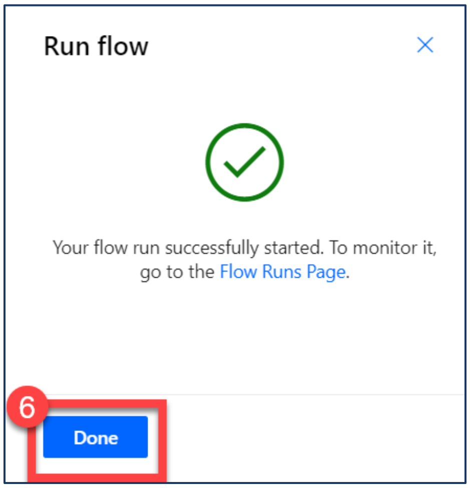


5. Power Automate will ask you one more time to run/test the flow… click the “Run Flow” button at the bottom of the panel.

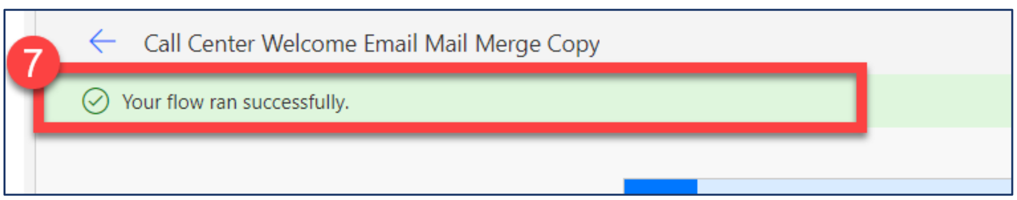


CONTINUED…

6. Click the “Done” button when the flow has successfully started.



7. Power Automate will tell you if your flow test succeeded or failed. If it succeeded, you will see a green bar appear near the top of your browser that says, “Your flow ran successfully.”



   If your test was successful, you should also see the emails in the programmed sender’s Sent folder in Outlook.

8. If your flow test was _not_ successful, Power Automate will say so and tell you why.

   NOTE: Power Automate will say your test failed if any values in your spreadsheet were empty (i.e. a recipient’s last name was blank). This means your flow did _not_ necessarily fail – it simply could not populate all merge tags.

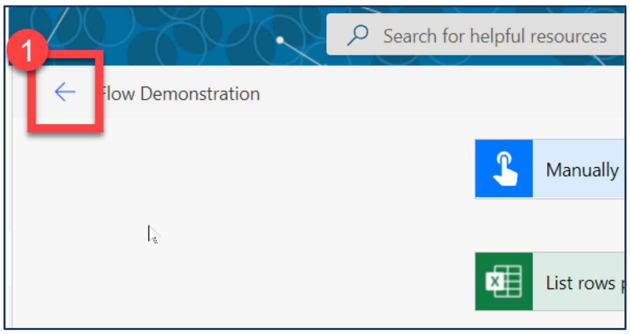
   You will also get a failure message if there are any extra, blank rows in your spreadsheet table. You can eliminate this failure reason by deleting extra rows in the table.

Step 15 – Run the Flow

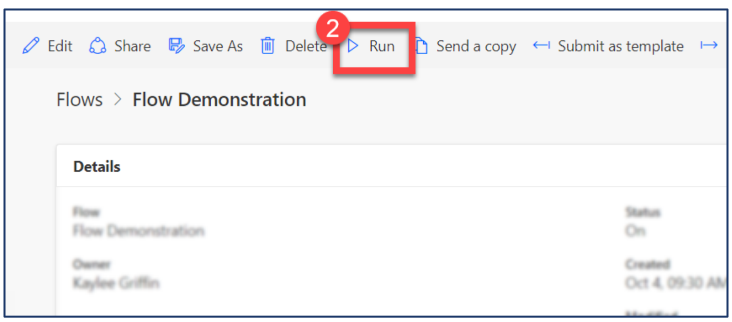
When you are ready to send out your emails, run the flow.

IMPORTANT: Once you've successfully tested the flow with a test spreadsheet, you must remember to link your real spreadsheet to the flow again. To do this, repeat Step 6, and save the flow.

1. Click the blue arrow pointing left next to the flow's title.

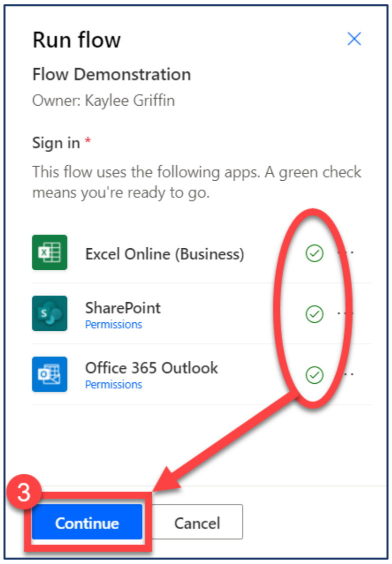


2. Click "Run" in the menu bar near the top of the screen.

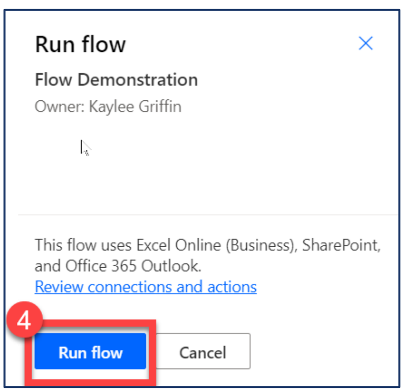


CONTINUED…

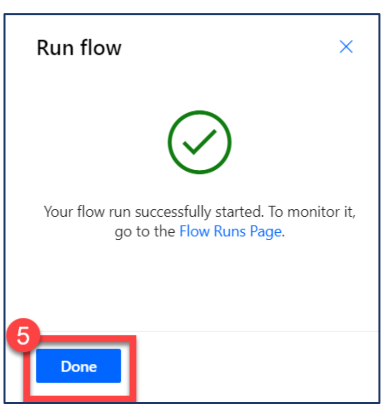
3. If you have three green check marks, click the “Continue” button in the box that appears to the right.



4. Click the “Run Flow” button.

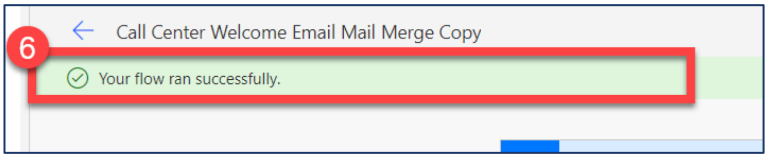


5. Click the “Done” button when the flow has successfully started.



CONTINUED…

6. Power Automate will tell you if your flow run succeeded or failed. If it succeeded, you will see a green bar appear near the top of your browser screen that says, "Your flow ran successfully."



IMPORTANT: If your run was successful, you should also see the emails in the Sent folder of the sender's Outlook account.

7. If your flow run was *not* successful, Power Automate will say so and tell you why.

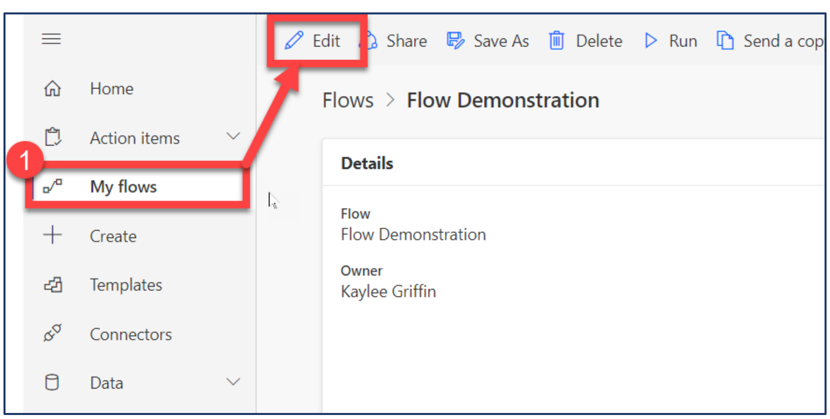
   NOTE: Power Automate will say your run failed if any values in your spreadsheet were empty (i.e. a recipient's last name was blank). This means your flow did *not* necessarily fail – it simply could not populate all merge tags.

   You will also get a failure message if there are any extra, blank rows in your spreadsheet table. You can eliminate this failure reason by deleting extra rows in the table.

Step 16 – Re-Use Your Flow

If you use the same spreadsheet setup for each batch of emails you send, re-using the same flow is easy. You can either use your current spreadsheet (if recipients do not change) or save a copy of your spreadsheet and re-populate it with new recipient data.

1. Open the flow for editing by clicking on "My Flows" when you open Power Automate in Office 365.



2. Repeat [Step 6](#) with your new spreadsheet.
3. Update the content of the email, if needed.
4. Run your flow following [Step 15](#).
   a. Unless you changed any of the steps, you should not need to test it again.